



Filing ID #10022326

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Josh Welle
Status: Congressional Candidate
State/District: NJ04

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2018
Filing Date: 05/14/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Arlington, VA [RP] LOCATION: Arlington, VA, US	JT	\$500,001 - \$1,000,000	Rent	\$5,001 - \$15,000	\$15,001 - \$50,000
Fidelity IRA [IH] DESCRIPTION: FIDELITY FREEDOM FUND 2050	SP	\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
Fidelity IRA ⇒ Fidelity IRA - American Fundemantal [IH] DESCRIPTION: American Fundamental Investors Class A		\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$1,001 - \$2,500
Fidelity IRA ⇒ Fidelity IRA - Fidelity Freedom 2040 [IH] DESCRIPTION: Fidelity Freedom 2040		\$50,001 - \$100,000	Interest	\$201 - \$1,000	\$15,001 - \$50,000
Fidelity IRA ⇒ Fidelity IRA - Lord Abbett [IH] DESCRIPTION: Lord Abbett Alpha Strategy CLA A		None	None		
Fidelity IRA ⇒ Fidelity IRA- Fidelity Advisor Freedom		\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$5,001 - \$15,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
[IH]					
DESCRIPTION: Fidelity Advisor Freedom 2020 CLtA					
Rumson, NJ [RP]	JT	\$500,001 - \$1,000,000	Rent	\$2,501 - \$5,000	\$15,001 - \$50,000
LOCATION: Rumson, NJ, US					
DESCRIPTION: None					
Vanguard Target Retirement 2025 TRSEL [MF]	SP	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$5,001 - \$15,000
DESCRIPTION: Spouse 401K					
Virginia Beach, VA [RP]	JT	\$100,001 - \$250,000	Rent	\$2,501 - \$5,000	\$15,001 - \$50,000
LOCATION: Virginia, VA, US					
DESCRIPTION: Rental property					

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Deloitte Consulting LLP	Consulting	\$22,000.00	\$126,322.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Sun Trust Mortgage	May 2010	Mortgage on rental property	\$100,001 - \$250,000
JT	US Bank	June 2016	Mortgage	\$250,001 - \$500,000
JT	Wells Fargo Bank	June 2017	Mortgage	\$250,001 - \$500,000
JT	Chase Bank	2017 - 2018	Credit card expenses	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- Fidelity IRA
DESCRIPTION: FIDELITY FREEDOM 2040

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Josh Welle , 05/14/2018